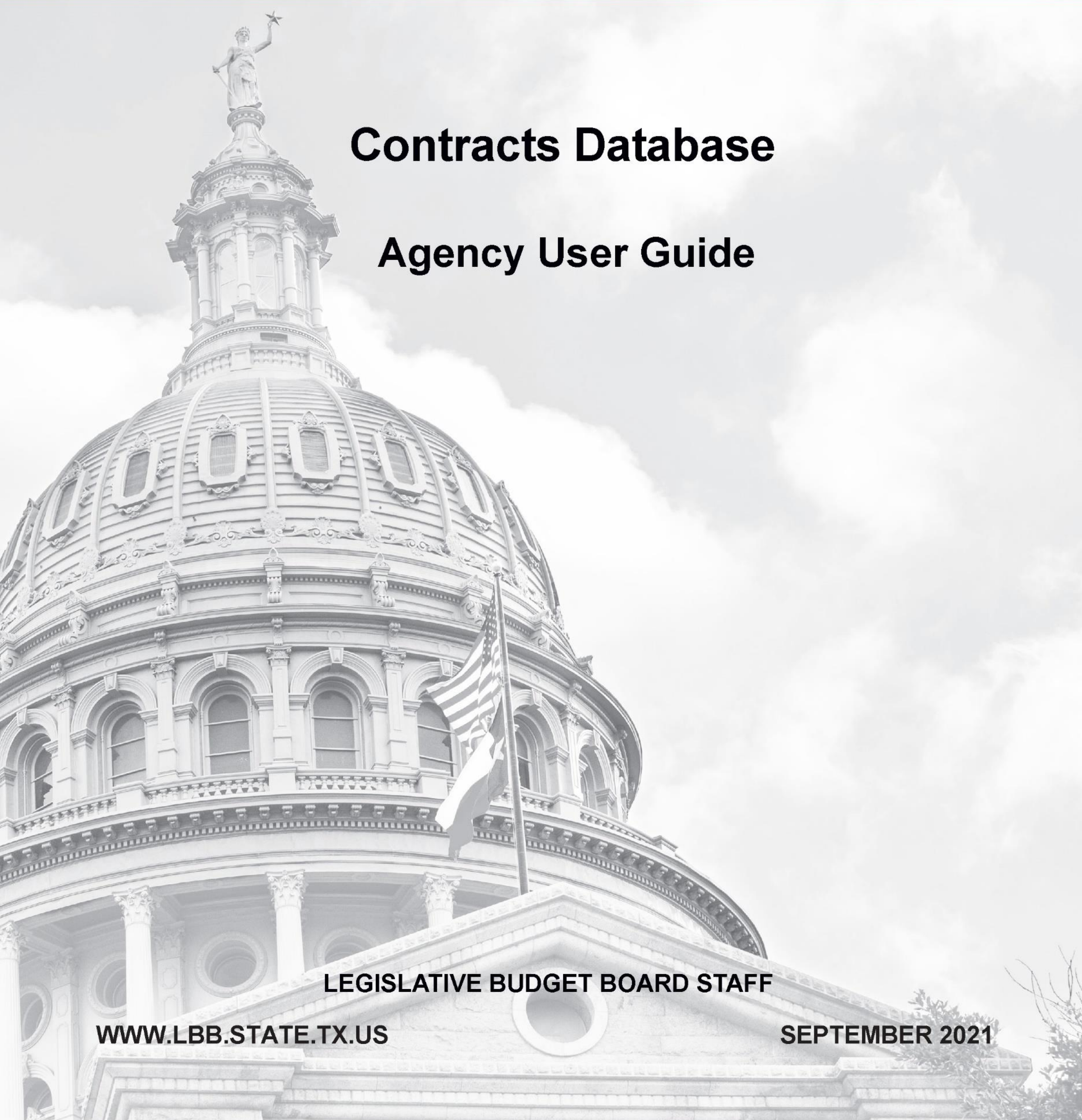
LEGISLATIVE BUDGET BOARD



Contracts Database

Agency User Guide

LEGISLATIVE BUDGET BOARD STAFF

WWW.LBB.STATE.TX.US

SEPTEMBER 2021

CONTENTS

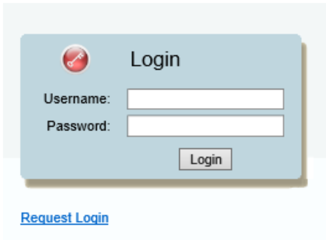
INTRODUCTION

The Legislative Budget Board (LBB) transitioned to the Contract Management System (CMS) on September 1, 2018.

This document is a brief guide about how to use the CMS interface, including searching records, submitting new records, and amending existing records.

LOGIN

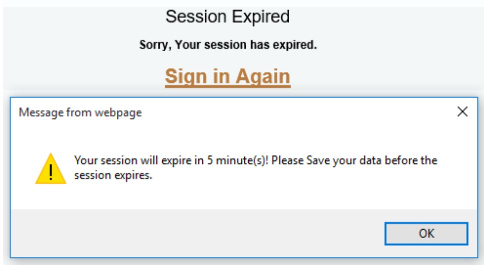
The login prompt is shown here:



New database credentials can be requested at http://loginreqagy.lbb.state.tx.us/

TIMING OUT

The interface improved system performance and prevented undue timing out of user accounts. **User sessions will expire after 15 minutes of inactivity.** The interface will give you a five minute warning that your session is about to expire. After this period of inactivity, the system will automatically log you out.



BROWSER COMPATABILITY

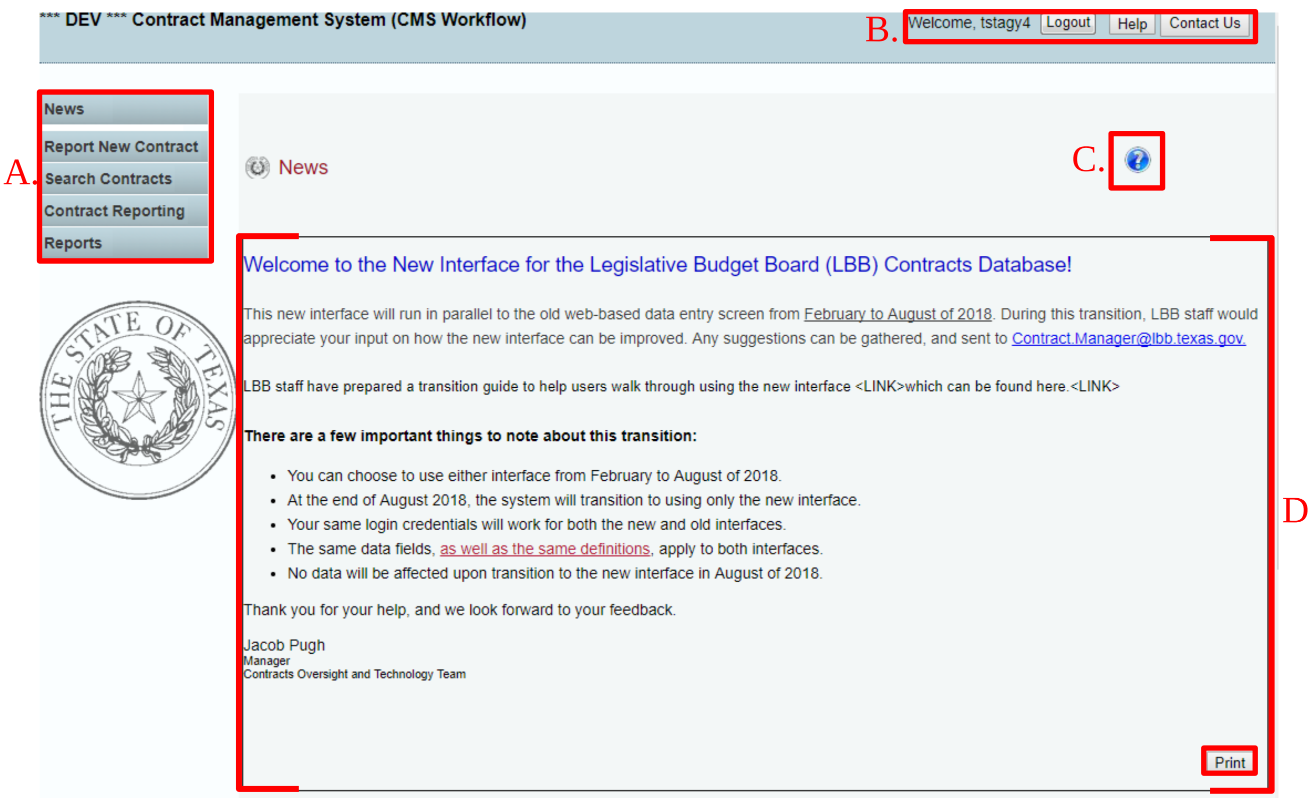
Internet Explorer or Google Chrome can be used for data entry. **Internet Explorer Version 11 is recommended.** Other browsers (e.g., Firefox, Safari, Microsoft Edge, etc.) will not work consistently and can create problems. The recommended screen resolution is 1280x1024.

DATA FIELD DEFINITIONS

The existing data fields are used in the CMS interface. Those data fields are defined in the Contracts Database Data Guide, and these definitions will display in the interface when you hover your cursor over a field.

MAIN "NEWS" SCREEN

Once you log in using your existing credentials, you will see the main "News" screen for the Contracts Database interface. This screen is the default dashboard for the interface.



On this screen you will find:

A. The main navigation menu;
B. Logout, Help, and Contract Us buttons, which appear on every page in the interface;
C. A help icon, which appears on every page in the interface; and
D. Important updates from LBB staff, which can be printed using the bottom right button.

MAIN NAVIGATION MENU

The main navigation menu is your primary tool for using the Contracts Database. When you hover over the "Contract Reporting" menu with your mouse, a submenu will appear.

These menu and submenus allow you to:

A. Return to the News Screen;
B. Report a new contract;
C. Search all contracts for your agency;
D. Access contracts pending submission;
E. Search submitted contracts to amend; and
F. Comply with LBB document requests (only when prompted by LBB staff).

SEARCH CONTRACTS

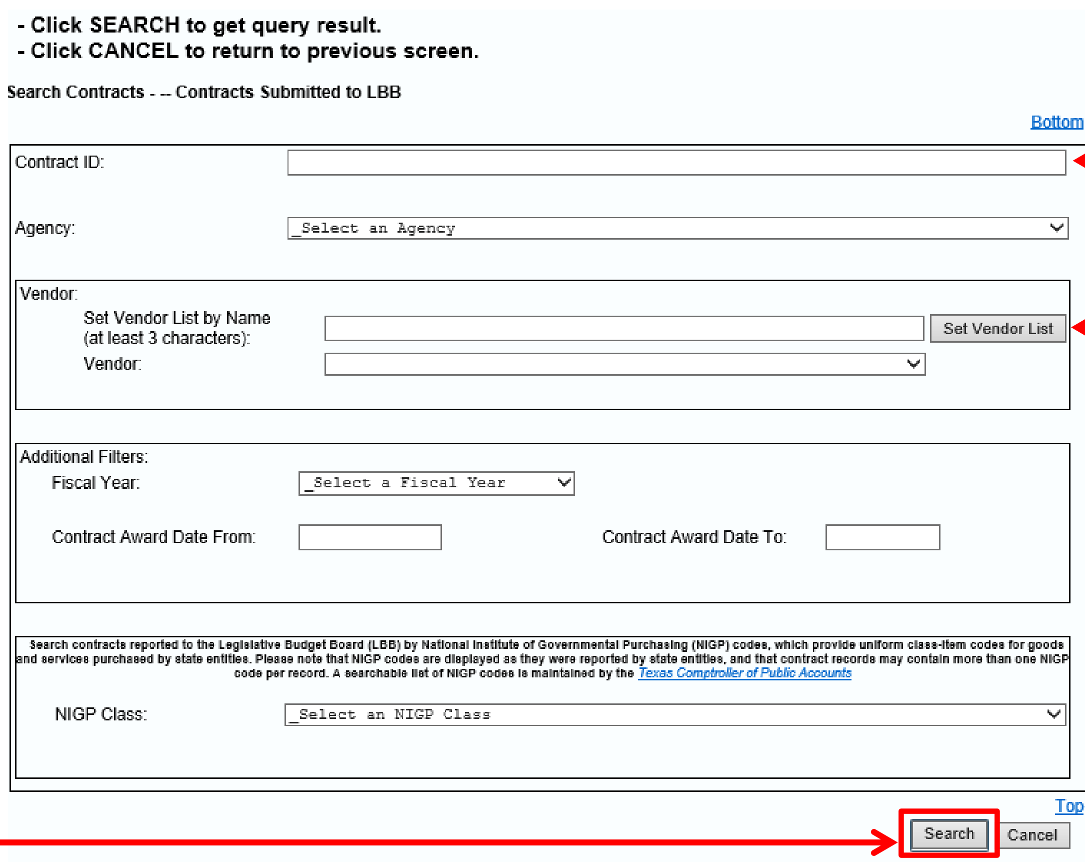
You can search submitted contracts, as well as saved but unsubmitted contracts, using the main navigation menu. Searching also allows you to access a submitted contract record to amend it.

From the main news screen, click the “Search Contracts” button to search all submitted and unsubmitted records.

This will allow you to filter and see all of the contracts your agency has in the Contracts Database.

SEARCH FILTERS

The system will give you several options to filter your search, including specifying a vendor, when the contract was awarded, and NIGP items that are a part of the record. **To see all submitted contracts, click the “search” button without applying any filters.**



Use this if you have a specific contract record you want to find.

1. Enter at least three characters;
2. Click “Set Vendor List”; and
3. Choose which vendor name you want as a filter.

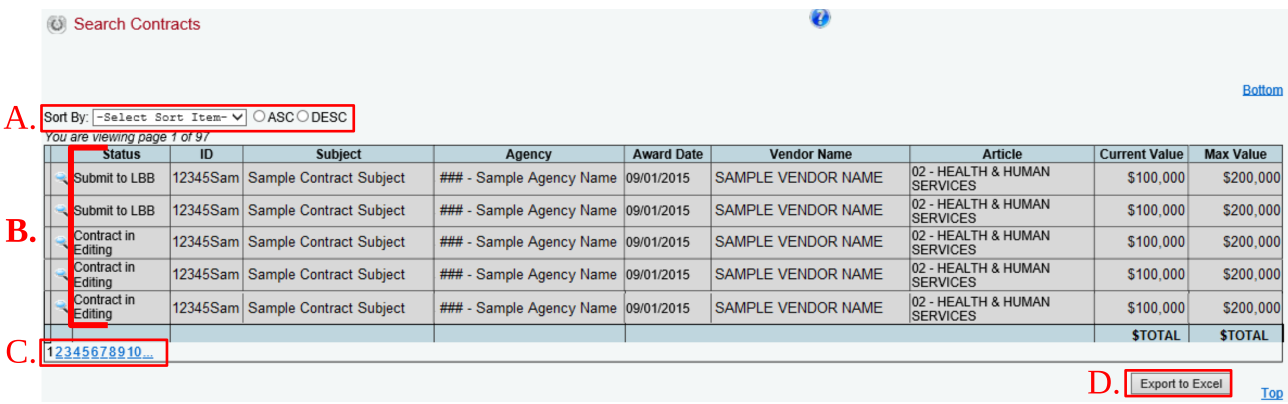
VIEWING SEARCH RESULTS

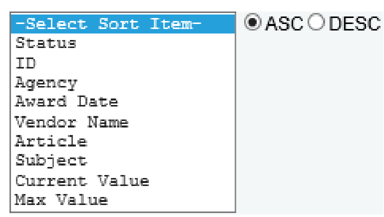
The results of your search will appear in a table based on the filters you applied. The rows of the table represent separate contract records in the Contracts Database, and the columns provide additional detail on each record.

This table features several tools to help you organize the information, including:

A. A sort feature to change the table's display order;
B. Indication of the record's submission status;
C. Navigation links to different pages of the search results; and
D. An option to export the search results to Microsoft Excel.

Clicking on the magnifying glass icon will open the contract record in that row.





A. Sort Results: Each column of the table can be sorted in either ascending ("ASC") or descending ("DESC") order. Select ascending or descending, and specify a column to sort by. The sort works on both aphabetical and numerical values.

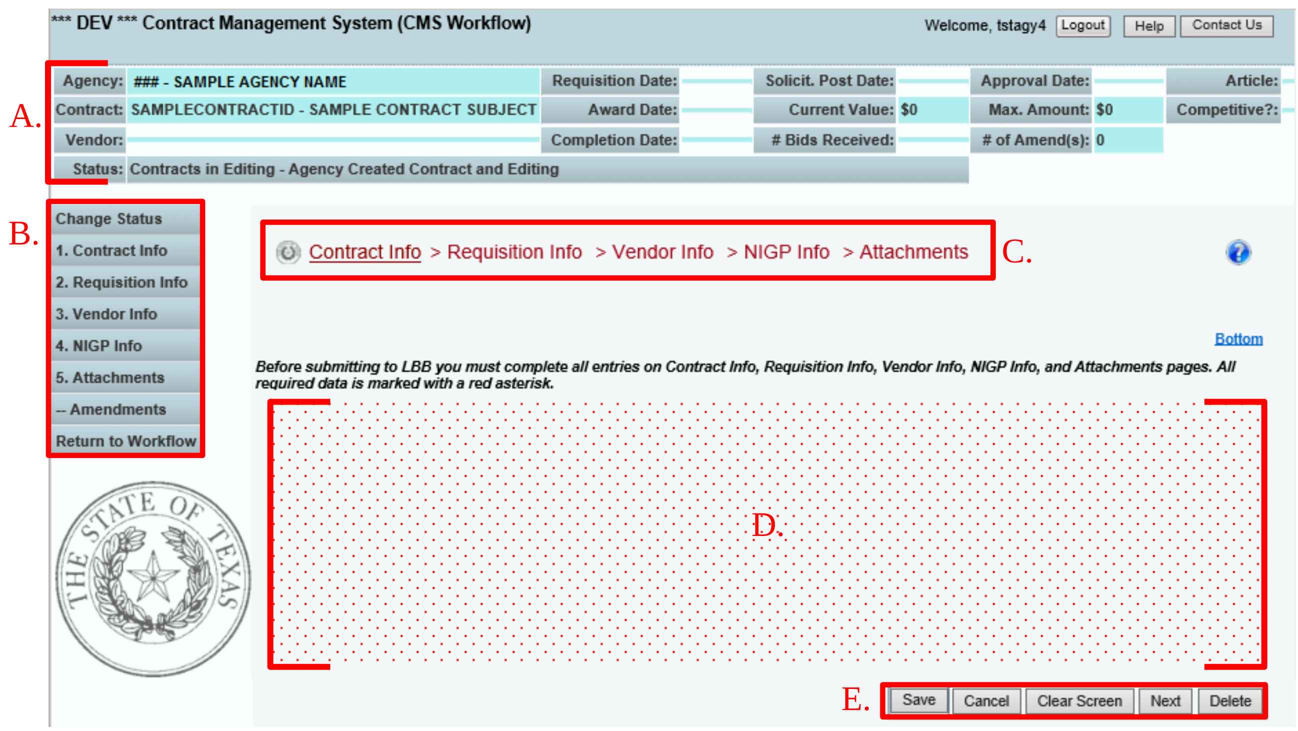
B. Submission Status: The "Status" column of the table indicates whether a contract record is submitted ("Submit to LBB"), or whether it is still in a saved/editing mode and is pending submission ("Contract in Editing"). **Only records marked "Submit to LBB" have been submitted to the system and reported to the LBB under statute and GAA requirements.** Submitted records are also the only ones eligible for new amendments.

D. Export to Excel: Click this button to download an excel spreadsheet containing all of the displayed data.

NAVIGATING A CONTRACT RECORD

Contract records are accessed through main navigation menu items on the "News" screen. Once you open a contract record, you will see certain elements shared across the entire system:

A. Summary info for the contract you are entering;
B. An expanded version of the navigation menu for moving around data entry pages;
C. A breadcrumb trail that shows progress on each reporting step;
D. Hover-over definitions for data entry fields; and
E. Action items that allow you to save info and navigate between reporting steps.



CONTRACT RECORD MENU

While visually similar to the main navigation menu, the expanded contract record menu only navigates around that particular contract record.

The screen for submitting or amending a contract record
Entry screen 1 for basic info
Entry screen 2 for solicitation and requisition info
Entry screen 3 to add a vendor
Entry screen 4 to designate all applicable NIGP codes
Entry screen 5 to add all required attachment PDFs
Displays all amendments for this record
Takes you back to your search results

If you wish to edit another record, you must click the "Return to Workflow" button which will take you back to your search results.

BREADCRUMB TRAIL

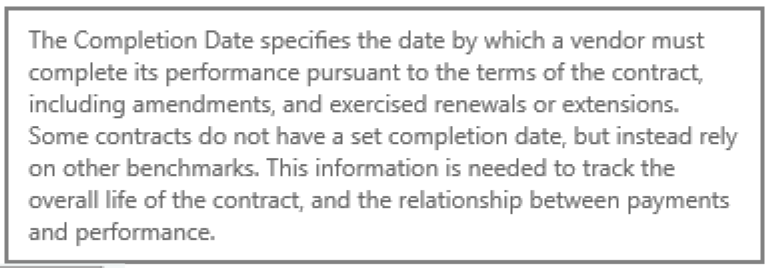
The breadcrumb trail acts as both a navigation aid as well as a tracker for your data entry progress. You can click on any of the steps to navigate to that particular entry screen.

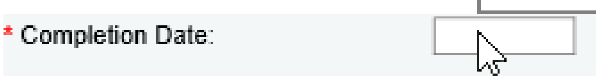
Your location within a given contract record is marked with an underline. Any time a reporting step is complete, it will show up as green with a checkmark. The above image shows that you are currently on the "1. Contract Info" entry screen, and that you have successfully completed that step.

Once you complete the entire record, all of the breadcrumb items will appear in green. This is an easy way to check if you are missing any required info before submitting the record. The image above indicates that you have completed all the steps, and are on the last "5. Attachments" entry screen.

HOVER-OVER DEFINITIONS

If you are uncertain what a data field means, hover your mouse cursor on top of the data entry box. A definition will pop up from the Data Dictionary. A sample is shown to the right.

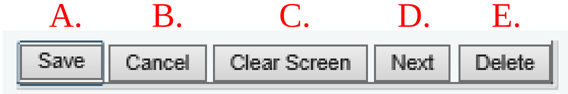




ACTION ITEMS

These buttons are included in each entry screen, and are your main tools for managing your data within that contract record. Most of the buttons execute a function only on that particular data entry screen. **The exception is "Delete", which will discard the entire contract record.**

A. B. C. D. E.



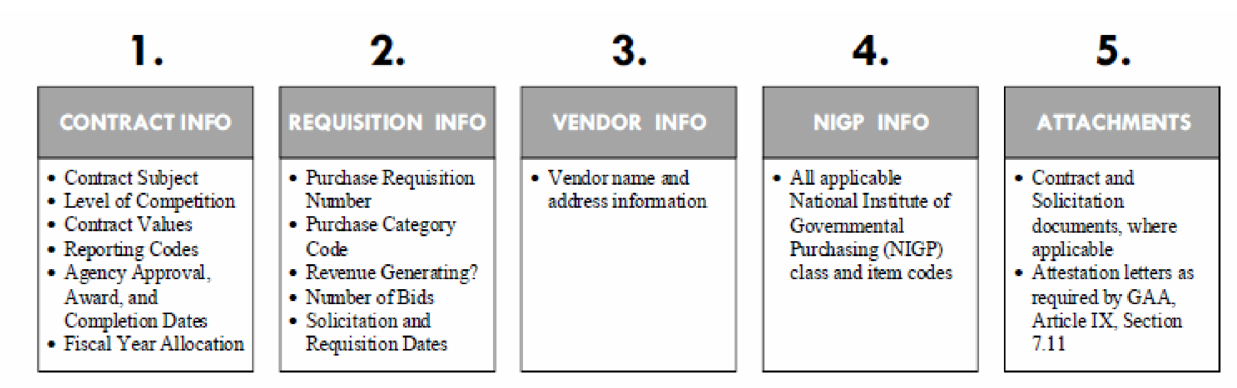
A. Save – Saves the data entered so far.
B. Cancel – Undoes the last action taken, even the "Clear Screen" action.
C. Clear Screen – Clears all of the data fields on that particular screen.
D. Next – Advances to the next data entry step screen. All entered data is saved when you advance to the next screen.
E. Delete – This will delete the entire contract record and all associated data. After clicking, you will be prompted once more before it deletes the record. **Only unsubmitted contract records can be deleted.**

REPORT A NEW CONTRACT

Clicking "Report New Contract" on the main navigation menu will begin the process of submitting a contract to the Contracts Database.

Contract reporting has been broken down into smaller steps, which allows you to save your data more often as you go and will improve overall system performance. Each step in the reporting process is shown in a menu item, and is also tracked in a breadcrumb trail that updates as you go along.

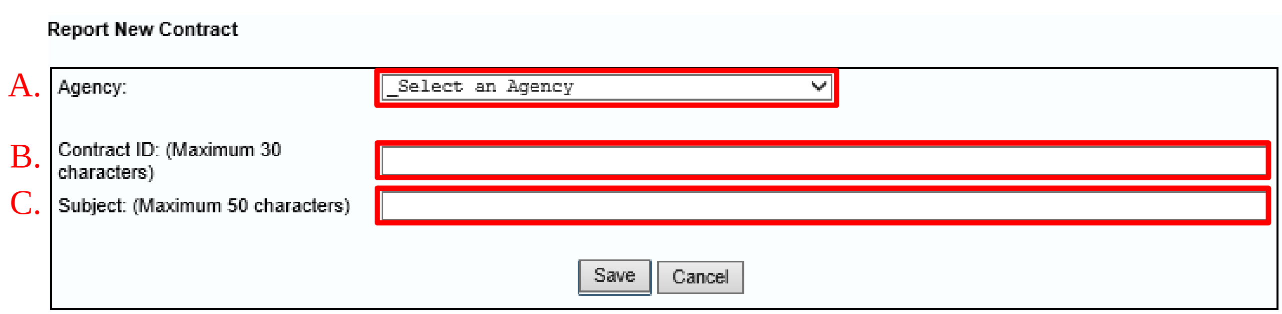
The following shows which data fields are associated with the reporting steps in the interface. These are based on the same fields from the previous web-based interface:



START WITH BASIC INFO

After you click "Report New Contract", the system will prompt you for some basic information before opening the new record:

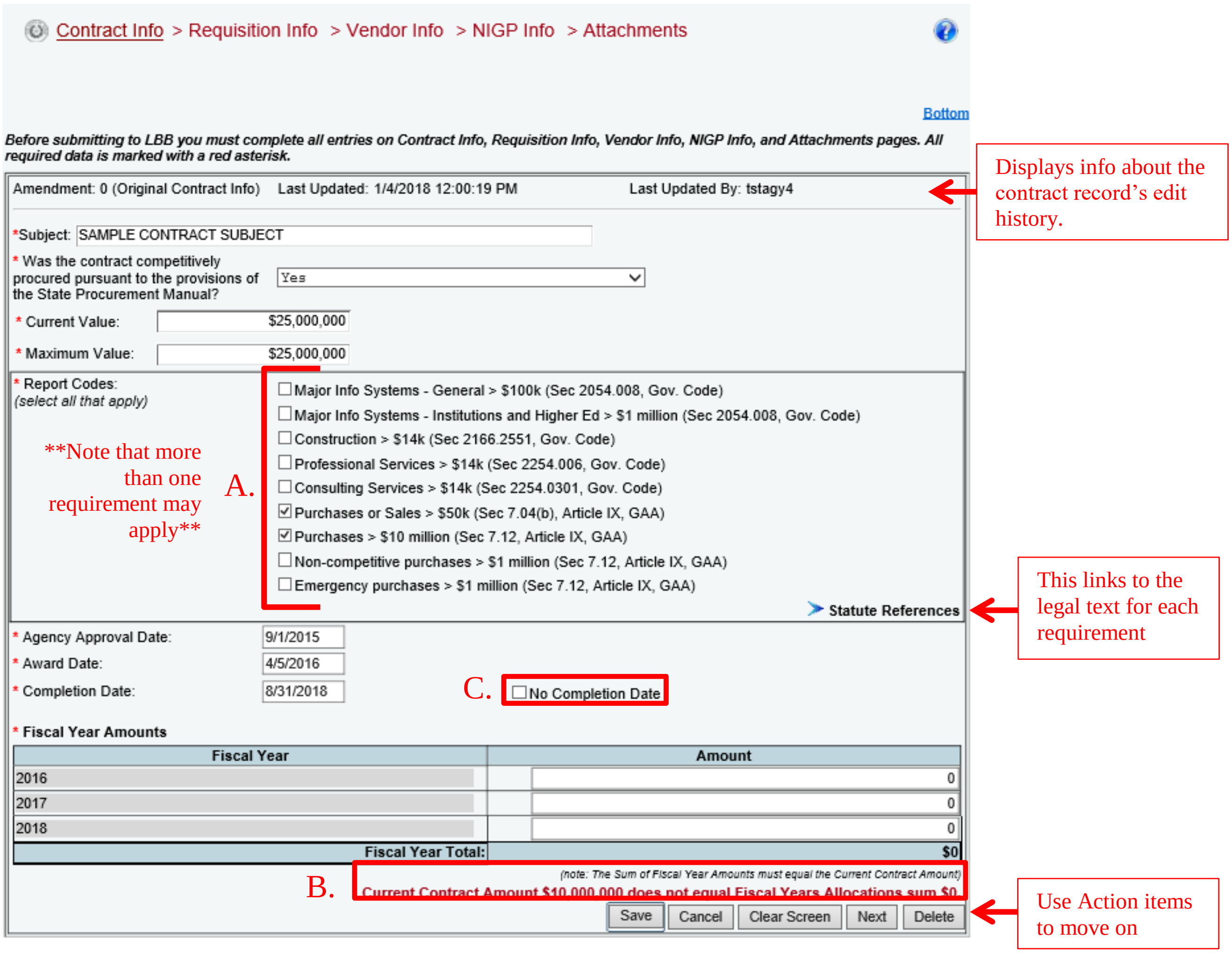
A. Which agency you are reporting for (some users are responsible for multiple);
B. The Contract ID you want assigned to the contract; and
C. A subject phrase that briefly describes the contract.



A new record will be created only after you provide these three data points and click "Save". After you click the "Save" button, the system will advance you to the first contract entry screen.

1. CONTRACT INFO

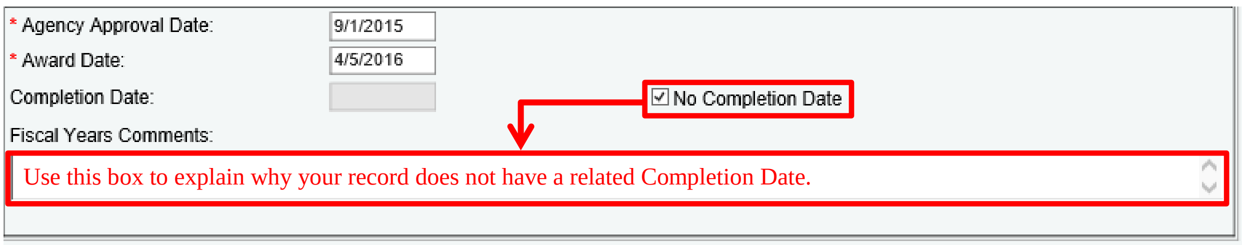
Upon initiating a record, the system will default to the "1. Contract Info" screen. **After you provide all required data, the action item buttons can be used to proceed.**



A. Reporting Code logic: Value thresholds for reporting contracts to the LBB are based on the Maximum Contract Value. After you enter the Maximum Contract Value, the system will automatically check applicable Report Codes underneath. **You are encouraged to review the selected codes and make sure all of the applicable codes are included.** Codes can be added or removed by clicking the adjacent checkbox, and multiple may apply to your record.

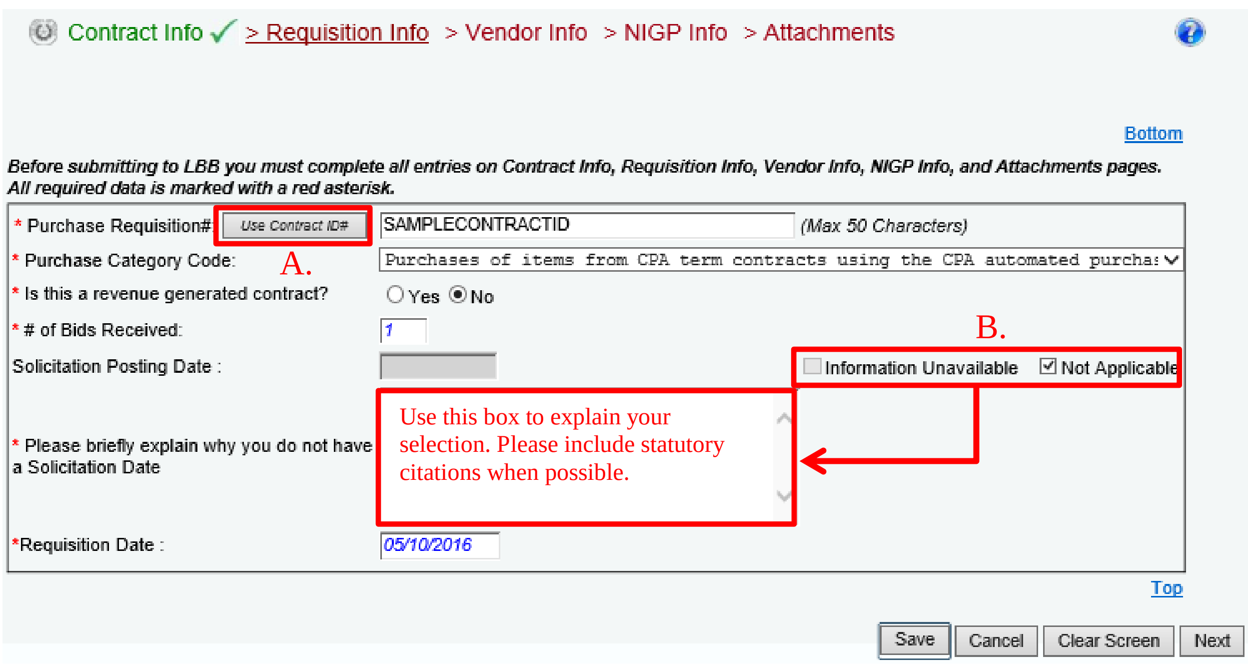
B. Fiscal Year Allocation check: Like the previous Contracts Database interface, you will be asked to allocate the total Current Contract Amount across fiscal years that the contract is active. The system will check if your Fiscal Year Allocation adds up to the Current Contract Value, and an error message will display if it does not.

C. No Completion Date button: Like in the previous interface, the system gives you the option of reporting a contract without a set Completion Date. This can be done by clicking the "No Completion Date" checkbox next to the Completion Date field. **When this is done, a text field will appear where you should explain why there is no Completion Date for the record.** Your explanation will not be publically displayed.



2. REQUISITION INFO

Clicking "Next" will take you to the second step, where requistion and solicitation information is entered. Notice the breadcrumb at the top of the screen updates as steps are completed.

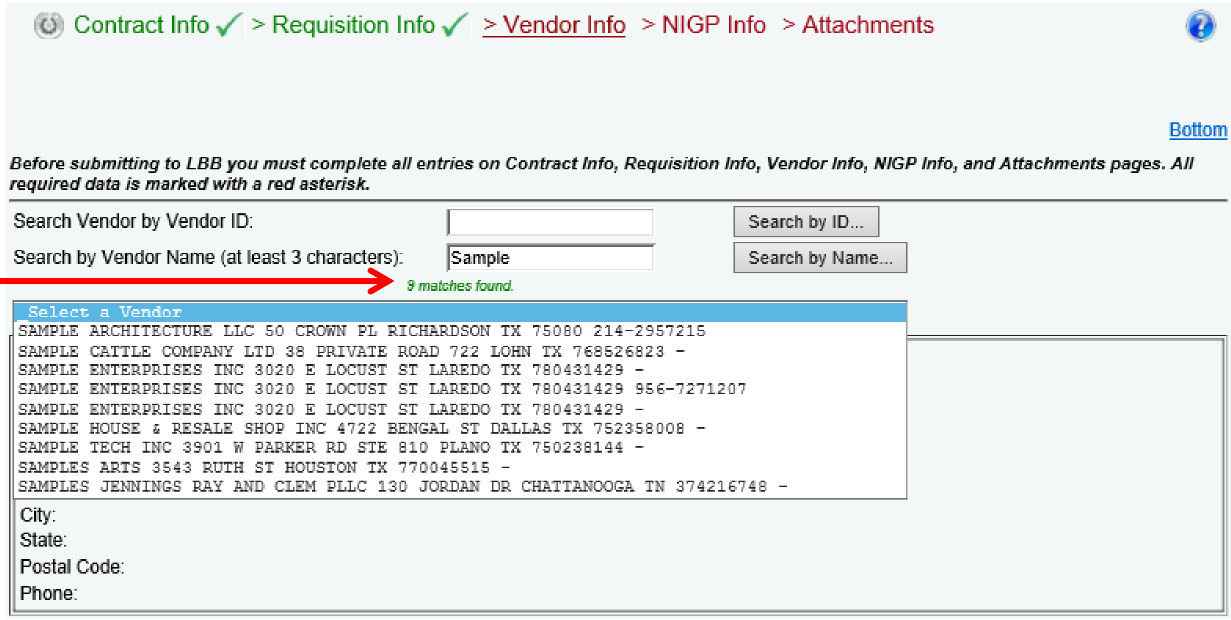


A. Use Contract ID# button: The system gives you the option of using the record's contract ID number as the purchase requisition number. This was implemented after getting feedback from agencies that do not use separate requisition identifiers. **If your agency uses a separate requisition identifier, please make sure to provide it.**

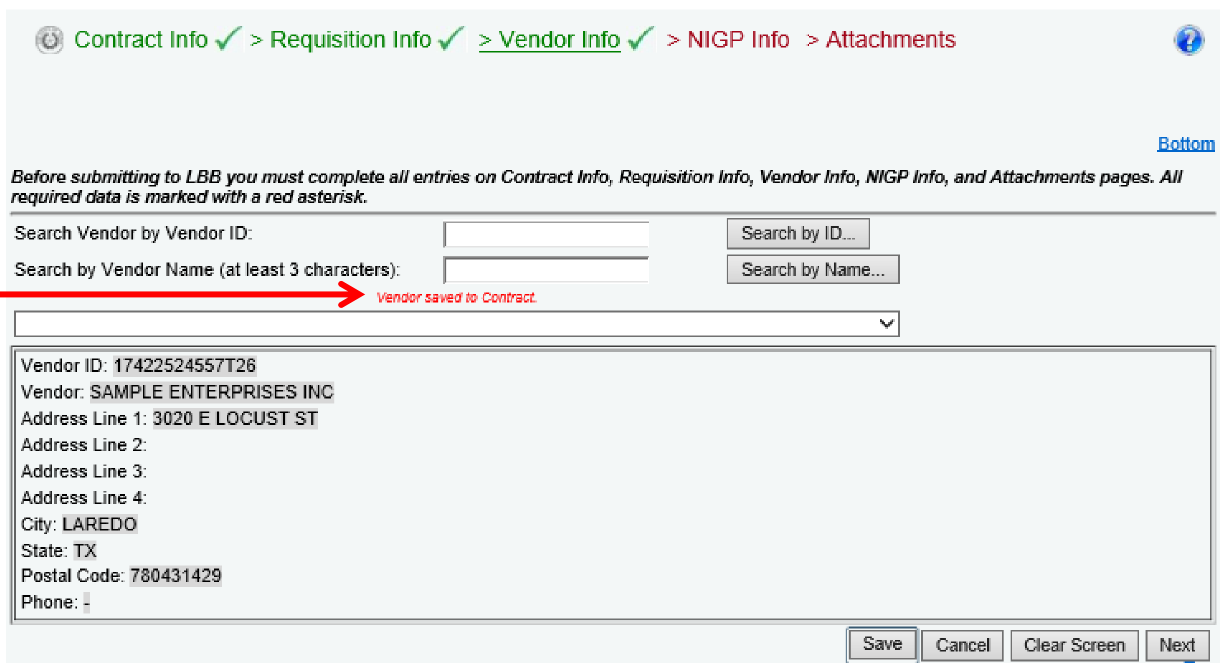
B. Solicitation Posting Date - Not Applicable / Unavailable: Two buttons are available to denote non-traditional solictations. Use "Not Applicable" if there was <u>no</u> solcititaion associated with the record. **Make sure to provide an explanation for the selection in the resulting text box.** The explanation will not be publically displayed after the record is submitted.

3. VENDOR INFO

The LBB receives nightly downloads from the Texas Comptroller of Public Accounts (CPA) to populate its vendor list. You can search for your vendor either with their 14 digit Texas Identification Number (TIN), or by name using at least three characters.



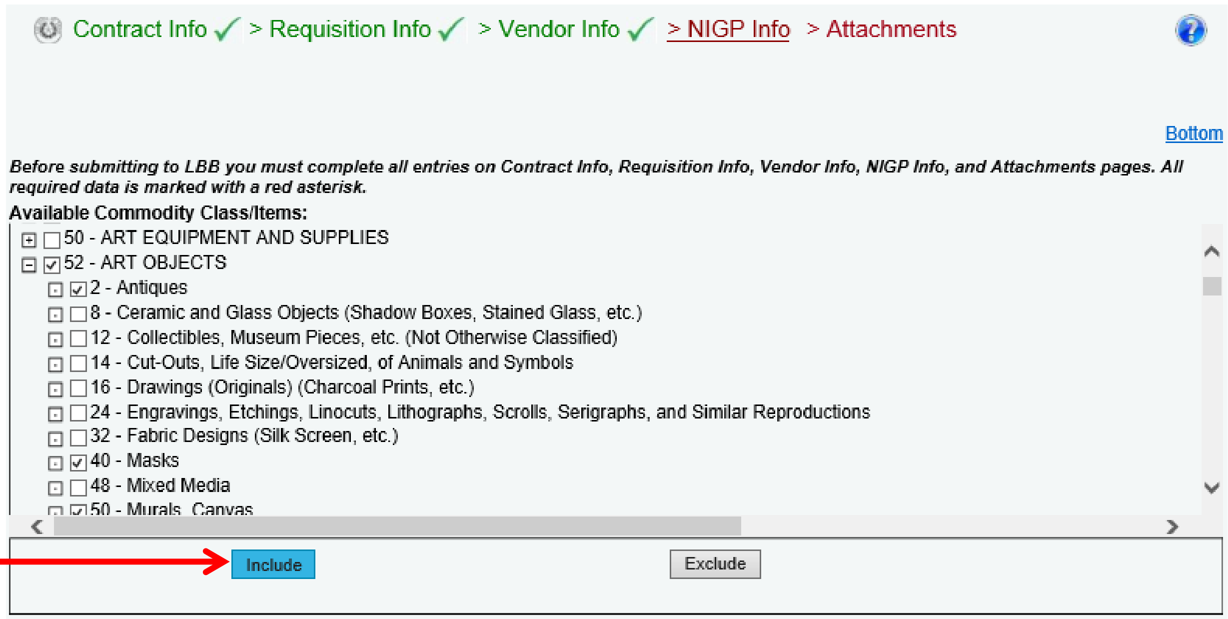
The system will let you know how many matches your search resulted in. **You must then select one of the vendor options, and click "save" or "next" for it to be assigned to your record.**



The system will let you know when the vendor has been added. If you are unable to find a vendor, email Contract.Manager@lbb.texas.gov for assistance.

4. NIGP INFO

The next data entry screen requires the assignment of National Institute of Governmental Purchasing (NIGP) codes to the record. NIGP codes consist of a class prefix and an item code suffix. **The CPA maintains an online reference guide for NIGP codes.**



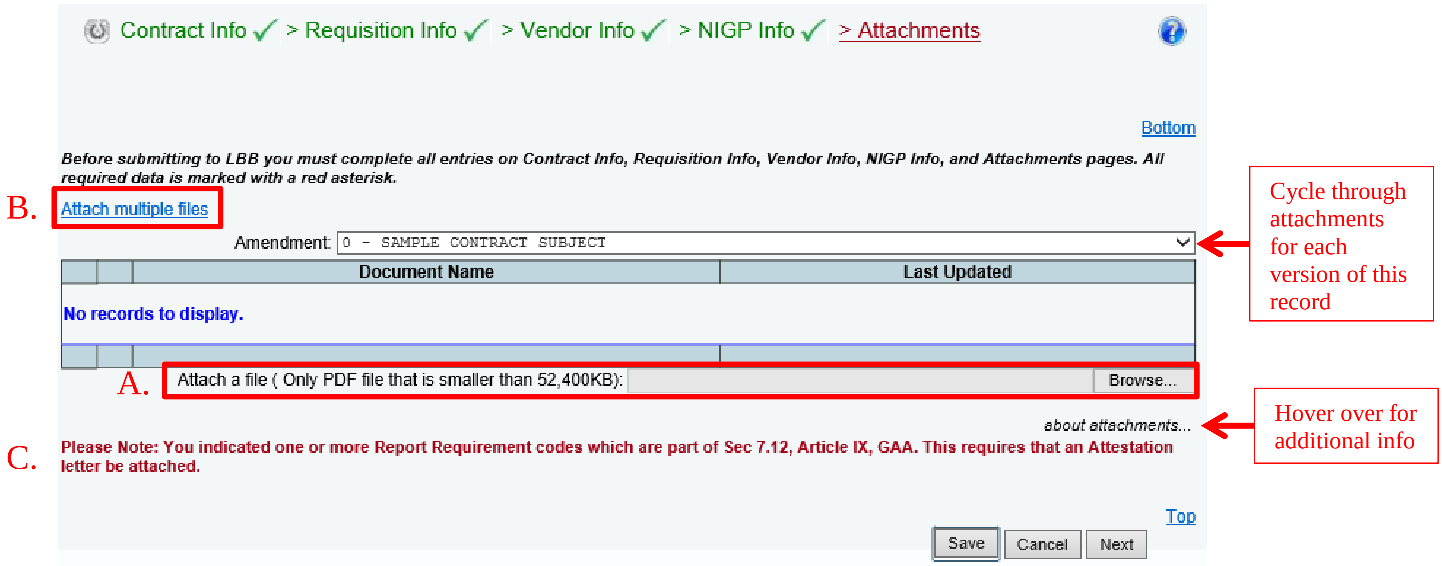
You add NIGP items and classes by checking the box next to the item/class and then clicking the "Include" button at the bottom.

Please note that selecting a check box next to an NIGP class will add that entire class to your record. To select a specifc item within a class, click the small + next to the class name to expand it and gain access to the item codes within:

NIGP codes will appear at the bottom of the screen after you click the "Include" button. The codes displayed in this list will be the codes assigned to your particular record.

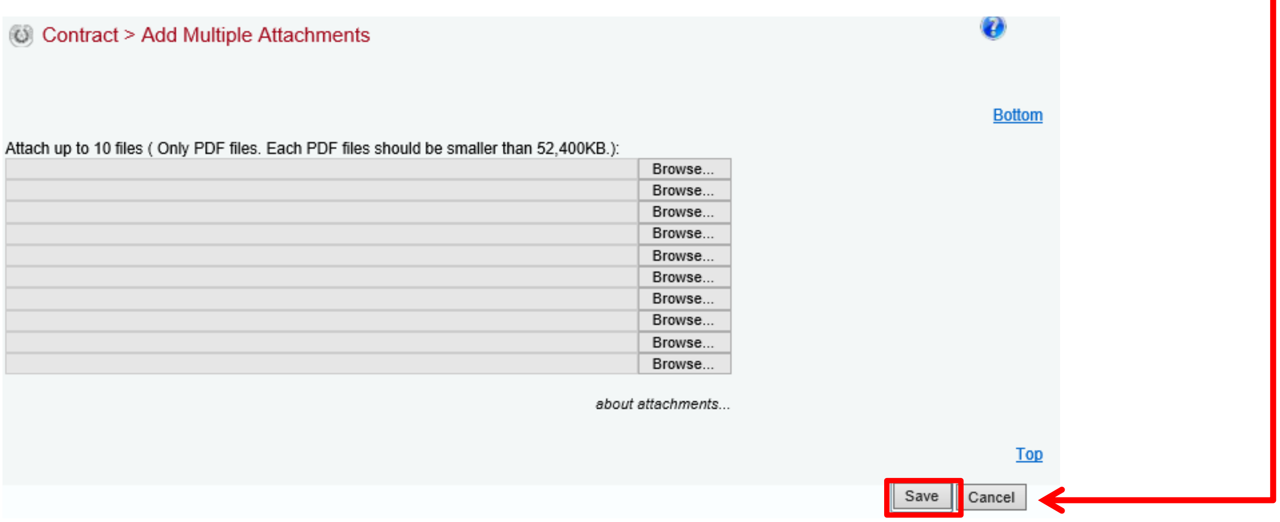
5. ATTACHMENTS

The final data entry screen is where contract, solicitation, and attestation attachments are added to the record according to the applicable reporting requirement. If you have questions about attachments or redactions, please contact Contract.Manager@lbb.texas.gov.



A. Browse: Use to upload one file at a time. **Click browse, select the PDF file on your system, and then click the save button to attach that document to the record.**

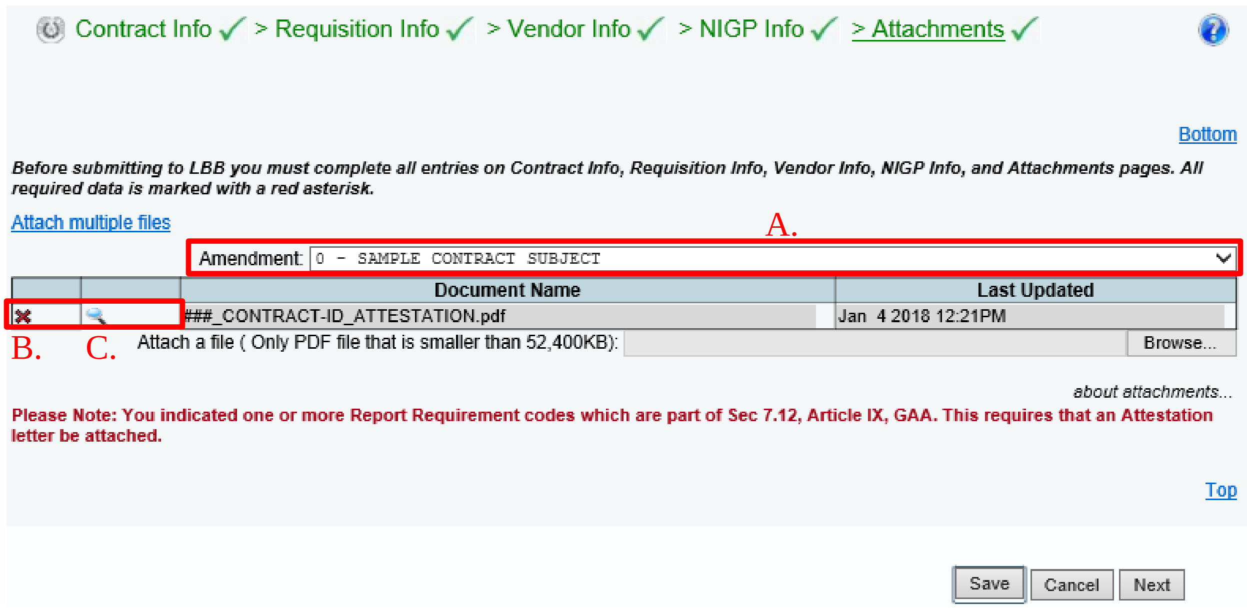
B. Multiple Attachments: Follow this link to a separate page that allows you to attach multiple files at once. **After selecting all of the files you want from your system, click save to return.**



C. Attestation Reminder: The system will look at the previously selected Report Codes for any that require an Attestation Letter (Article IX, Section 7.11, GAA). If you selected any that do, it will remind you to provide that attachment.

After you have attached a file, it will appear in the table on the Attachments screen. This will show a timestamp when each file was added to that Contracts Database record. Additional features allow you to view the files, see which are associated with different versions of the record, and to remove files from the record.

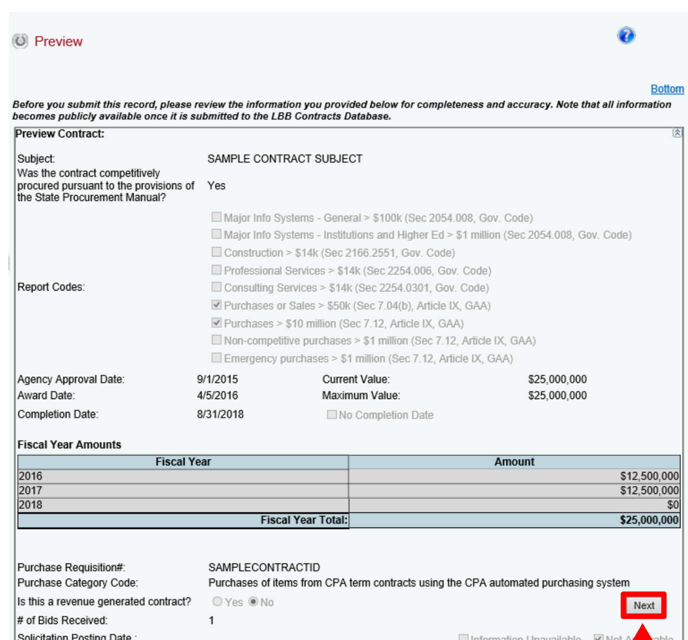
A. Use the Amendment dropdown menu to see diffent attachments associated with each version of the record;
B. Delete an attachment using the red X icon; and
C. View the file using the magnifying glass icon.



PREVIEW BEFORE SUBMISSION

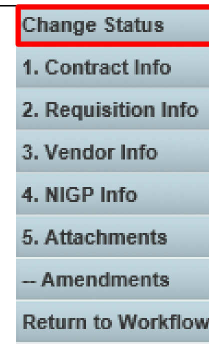
Once you have attached all required documents, you can review your work before final submission. The system will bring you to a final preview screen.

Take a moment to do a quality control check on the record. **Once you are satisfied that the data is complete and accurate, click the "Next" action button to proceed to final submission.**



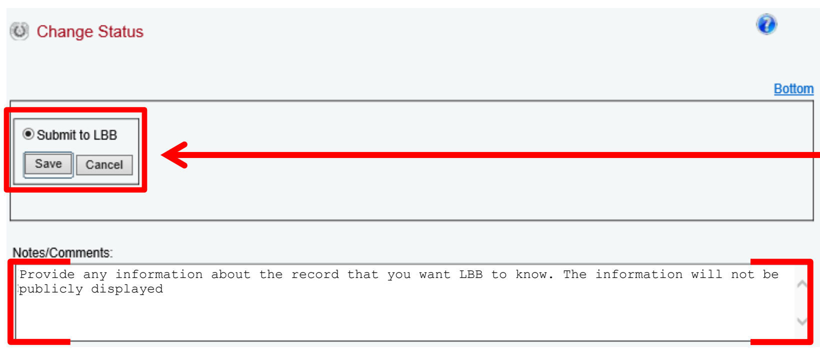
SUBMIT CONTRACT RECORD

Submitting contract records is done on the "Change Status" screen, which can be accessed any time through the navigation menu (see right). The system will also bring you to this screen by default after you have completed the previous reporting steps.



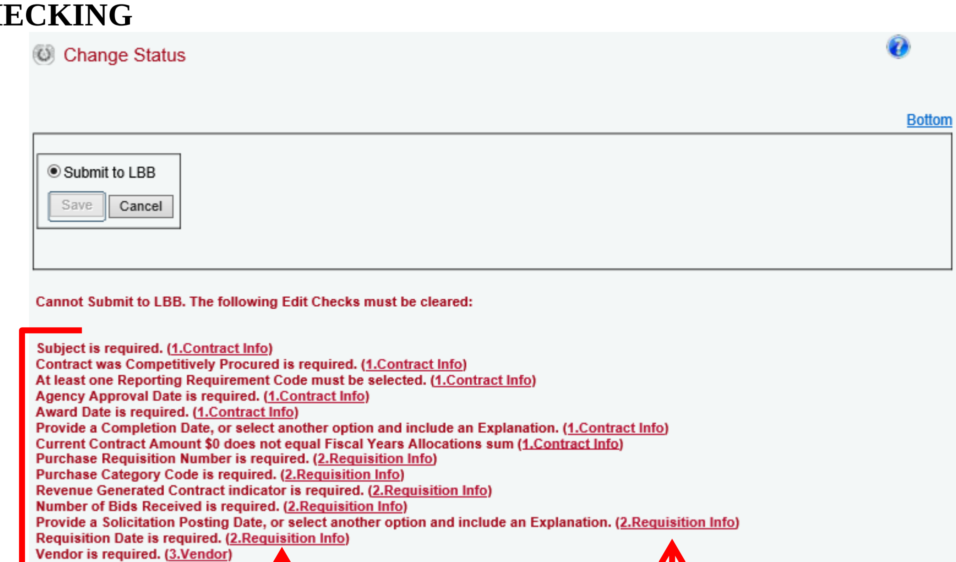
When submitting a completed record, you have the option of including a note. Use this as an opportunity to provide any information you may think is relevant to the record that is not otherwise captured in the data fields. This optional information is only for LBB staff use, and will not be publicly displayed on the Contracts Database website.

To submit the record to the Contracts Database, select "Submit to LBB" and click the "Save" button. Records immediately become public once they are submitted.



FINAL ERROR CHECKING

The system will not let you submit a record that contains data errors. **Any errors will appear in a list, and they must be addressed before the record can be submitted.** Links at the end of the error message will take you to the location of the error within the record.



AMEND A CONTRACT

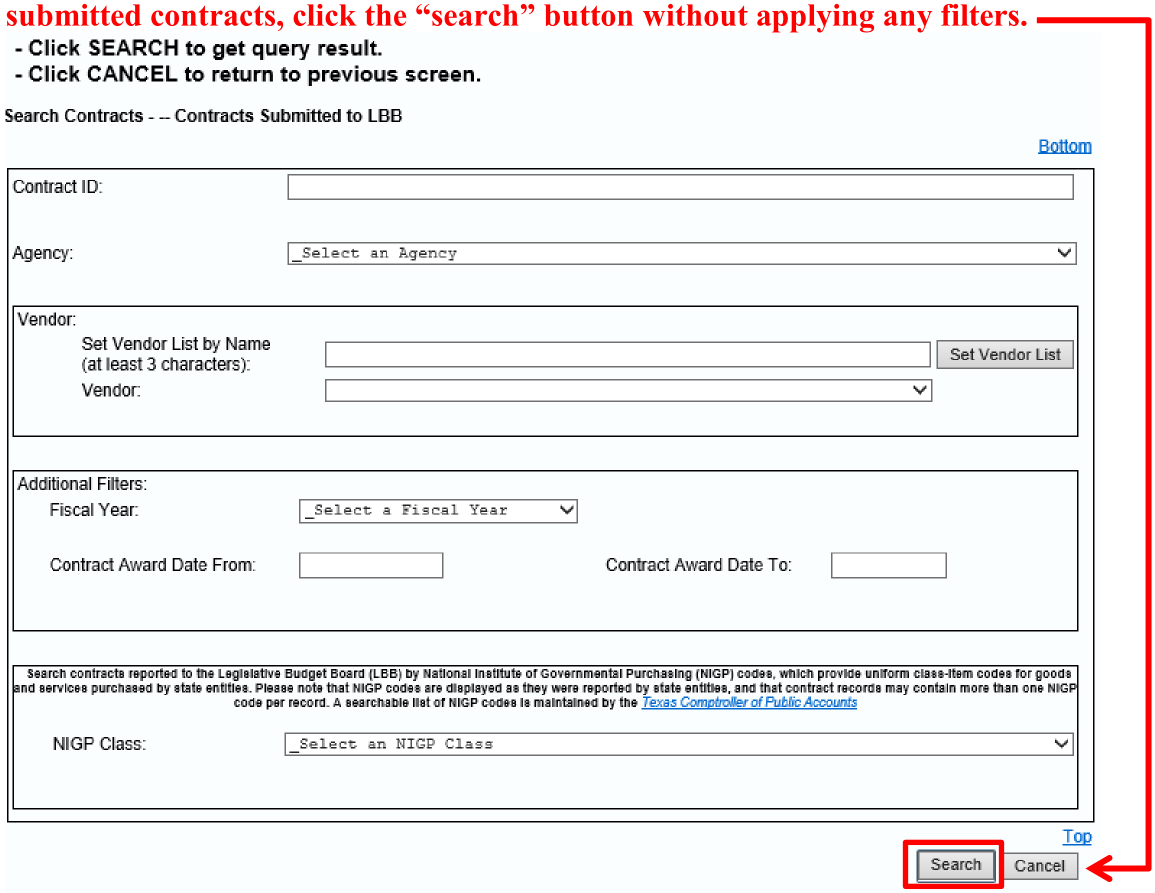
The Contracts Database allows users to re-open contract records and amend certain information within them. This can be used if your agency executes a renewal, extension, or change request on a contract. Similar to reporting the original contract, amendments should be reported to the Contracts Database within 30 days of execution.

SEARCH FOR THE CONTRACT

From the main news screen, click the "Contracts Submitted to LBB" button. This will allow you to filter and search all of the contracts your agency has reported to the Contracts Database.

Only records that have already been submitted to the Contracts Database can be amended.

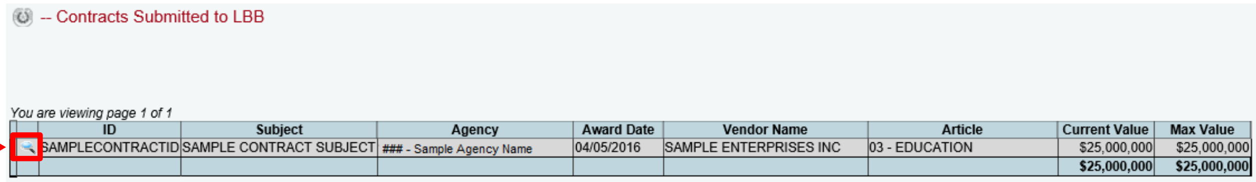
The system will give you several options to filter your search, including specifying a vendor, when the contract was awarded, and NIGP items that are a part of the record. **To see all submitted contracts, click the "search" button without applying any filters.**

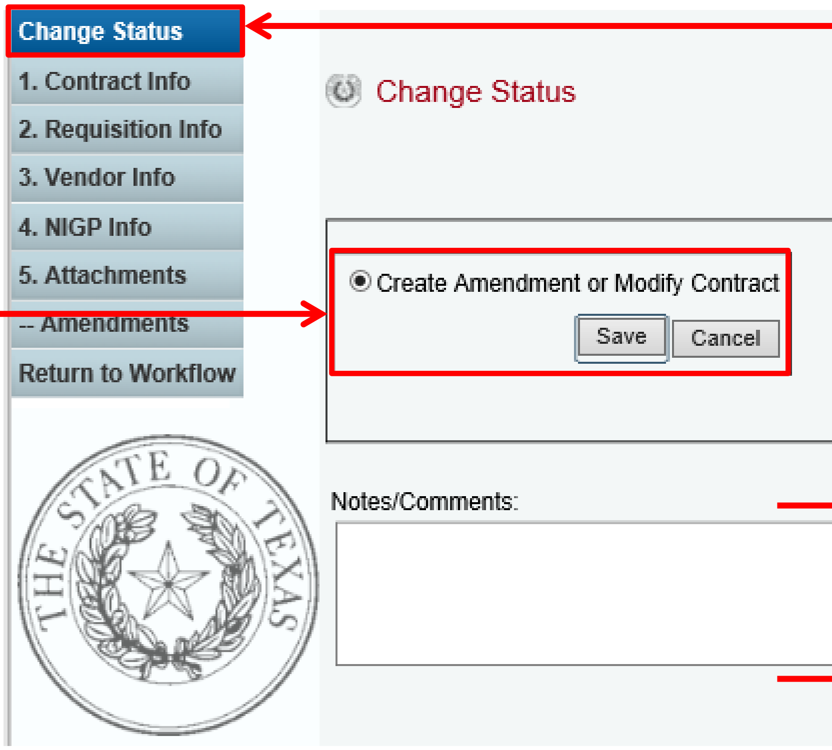


UNLOCK THE CONTRACT

Each submitted contract record will appear as a separate row in the resulting search table, and each column will provide some basic information about the record.

To display a record, click the magnifying glass icon in the applicable row. This will display the submitted record, but it will still be locked against edits.





Once the record is displayed, use the "Change Status" screen to unlock the record for your updates.

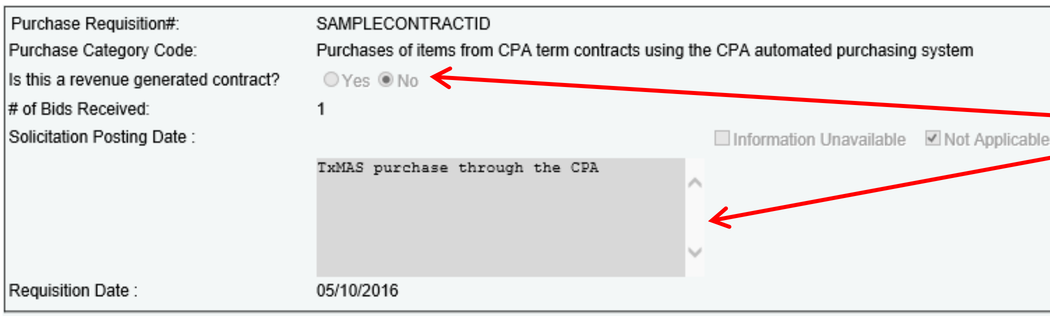
The "Create Amendment or Modify Contract" option will appear on the Change Status screen. If this option is unavailable, the record is still pending submission or edits.

You have the option of providing a note about why this record is being amended. This information will not be publicly displayed.

To unlock a contract record for your edits, first select "Create Amendment of Modify Contract" and then click "Save". This will open up the record, and allow you to edit certain data fields.

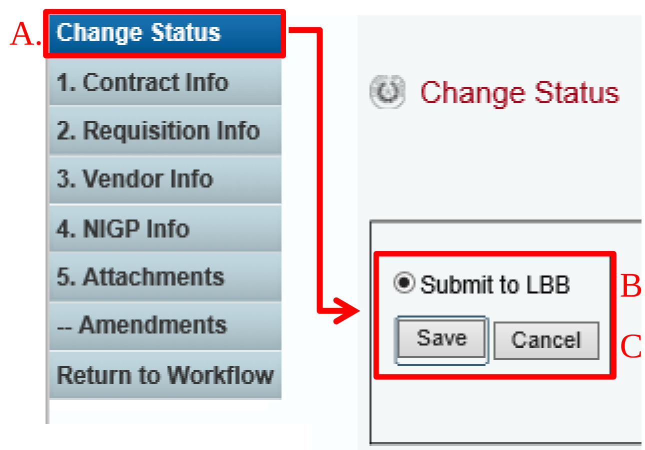
UPDATE AND SUBMIT

The entry screens used to amend a contract record are the same as those for submitting the original data. Once the contract record is open, you will notice that some data fields will remain locked. These locked fields cannot be edited without assistance from LBB staff (Contract.Manager@lbb.texas.gov).



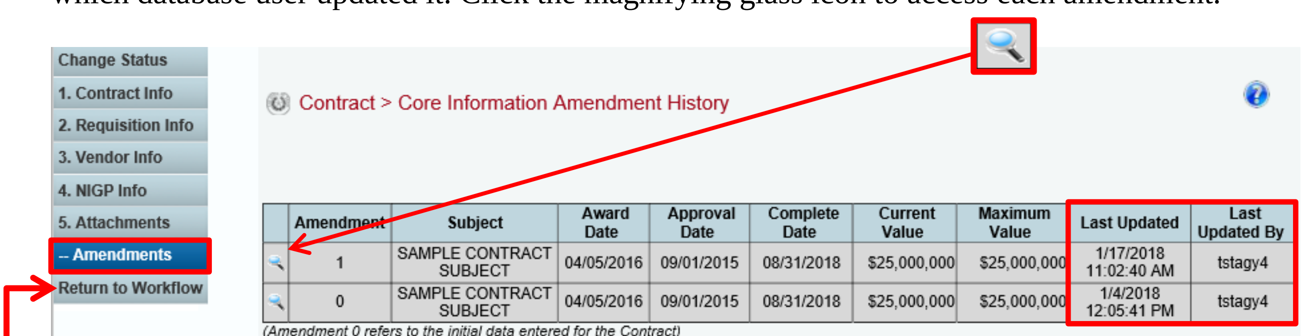
Any grayed-out fields can not be edited.

Once you are satisfied with your changes,
A. Navigate to the "Change Status" screen;
B. Select "Submit to LBB"; and
C. Click the "Save" button to resubmit the record.



Similar to a regular contract record, you will have to rectify any error messages before final amendmnt submission. Amendments to contract records will become publicly available once they are submitted.

You can track information about your amendments through the "—Amendments" screen. This screen displays each time the contract record was updated, what time it was updated, and which database user updated it. Click the magnifying glass icon to access each amendment.



Only one contract record can be amended at a time. These steps will need to be repeated for each contract record you wish to update. **Click "Return to Workflow" to go back to your search results, and to access other contract records.**